



## Troubleshooting infocapture notifications

Infocapture notifications are a really important part of the workflow and configuration of infocapture forms, it can be frustrating if they are not appearing to work in the way you were expecting.

In this article we are going to cover tips and tricks for locating or understanding why notifications are missing and also why unexpected notifications may have arrived.

### Locating the cause of a missing notification

#### 1- Verification that the notification did or did not send

If you are running Claromentis 8.8.9+, we added additional tracking for infocapture notifications within the audit panel. As shown below:

If you can locate a submitted ticket which you would have expected to produce a notification, you will need to cross reference the time the notification should have triggered with the time range selected in the audit.

If the notification did send but was not received it means:

- Your form is functioning correctly
- The email left the system, but did not (for some reason) reach the inbox of the user
  - Was the email address correct / could the email be in spam or junk
  - If we host your site, you can submit a support ticket and we will check the SMTP server to see if the email has bounced or is blocked for any reason
  - If you are self-hosted (on-premise) you may wish to check your SMTP server to trace why this email did not reach the inbox

If you do not have access to the additional audit tracking you may need to check the SMTP setting to see if there were any blocked messages or it could mean there is something wrong with the form.

## 2 - Is the form correct

If the notification did not appear in the audit tool at all - it means the form is not configured correctly.

In this scenario the customer support team did not get a notification that a new ticket was submitted, it is best to work backwards from the notification itself. When looking at the notification configuration these are the two key questions:

**Advanced notifications**  
Configure email notification to inform users about changes in the tickets.

This is dependent on Triggers having first been added. The second action must be to either create a Notification Template or visit the Default Notifications Field page, to define the content of your email notifications when they send.

For a given trigger, you can specify the roles, individual email addresses, or use tickets on your own. For example, a trigger of 'New Ticket Submitted' could be configured to send notifications to a project role called 'Approvers', with a role of 'Approvers'.

**Is this trigger correct?**

**Does this role have permissions to view tickets?**

+ Add new rule

Trigger	Notification type	Notification template	Send notifications to	
New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	↓ 🗑️
New issue reported	Email	Issue reported: Development	Development	↑ ↓ 🗑️
Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ ↓ 🗑️
Status changed	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ ↓ 🗑️
Note added	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ 🗑️

### 1 - Is the trigger correct?

If we check back to the trigger configuration, it all seems correct:

+ Add new trigger

Name / Order #	Rules	Use for dynamic fields changes	Use for notifications	Notification type	
= New issue reported	New ticket submitted	Yes	Yes	Email	🗑️
= Status changed	Any of these fields changed: (STATUS)	Yes	Yes	Email	🗑️
= Note added	Public or private note has been added	Yes	Yes	Email	🗑️
= File upload	File has been uploaded	Yes	Yes	Email	🗑️
= Assigned changed	Any of these fields changed: (ASSIGNED TO)	Yes	Yes	Email	🗑️

Admin / Infocapture / Bug Tracker / Triggers / Add/Edit a trigger

**Trigger properties**

Name:

Rules:

Name	Value
<input checked="" type="checkbox"/> Ticket activity	<input checked="" type="radio"/> New ticket submitted <input type="radio"/> Public or private note has been added <input type="radio"/> Public note has been added <input type="radio"/> Private note has been added <input type="radio"/> File uploaded
<input type="checkbox"/> Any of the following fields changed	<input type="checkbox"/> Type (type) <input type="checkbox"/> Reproducibility (reproducibility) <input type="checkbox"/> Severity (severity) <input type="checkbox"/> Priority (priority)

If this trigger is based off a field condition set, this will also need checking. You will then need to insure every condition that was identified within the field condition set was definitely met when the user submitted the ticket.

### 2- Does this role have permissions to view tickets?

When a specific role is entered into the notification configuration (rather than a direct email for example) the system will run a check to ensure that role has permissions to view tickets. As notifications often contain ticket details, it would be a permissions loop hole if roles placed here could get notifications without the 'view tickets' permission.

Checking the permissions, we can see the 'Customer support' role is missing this permission:

Project roles   Rights   Options   All

Rights	Project role						
	<input type="checkbox"/> Admin	<input type="checkbox"/> Development	<input type="checkbox"/> Testing	<input type="checkbox"/> Users	<input type="checkbox"/> Customer support	<input type="checkbox"/> Submitter of ticket	<input type="checkbox"/> Ticket handler
View tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Update tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submit tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Handle tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Update tickets status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assign tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Add notes to a ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View attached files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Attach files to a ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View history of tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manage tickets (delete, files, notes)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View reports page	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
View statistics page	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

## Locating the cause of an unexpected notification

If you have a notification arrive which you do not see configured in the notification panel, this could indicate one of the following scenarios.

1- If the recipient of the notification was either the ticket submitter or ticket handler - are either of these boxes ticked:

Admin / Infocapture / Bug Tracker / Notifications

**Notifications**

Configure email notification to inform users about changes in the tickets.

Notify submitter about any changes in the tickets

Notify ticket handler about any changes in the tickets

[Save](#)

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**Advanced notifications**

Configure email notification to inform users about changes in the tickets.

This is dependent on Triggers having first been added. The second action must be to either create a Notification Template or visit the Default Notifications Field page, to define the content of your email notifications when they send.

For a chosen Trigger, an email notification can be sent to project roles, individual email addresses, or user pickers on your form. For example, a trigger of 'New Ticket Submitted' could generate an email to a project role called 'Approvers', with a notification template asking the role's users to approve the ticket.

[+ Add new rule](#)

Trigger	Notification type	Notification template	Send notifications to	
New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	↑ ↓ 🗑️
New issue reported	Email	Issue reported: Development	Development	↑ ↓ 🗑️
Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ ↓ 🗑️

Having either of these ticked will result in the handler or submitter receiving a default notification. If you wish to customise the default notification, here is some guidance.

2 - A second place to look (if the above are not checked) is in the front end of the infocapture in the ticket list view. You will need to ask the user who is getting these notifications to check whether any of these settings are checked:

InfoCapture / Demo Form

Ticket # Jump Search Switch to Demo Form

+ Submit ticket

This project is in "testing" state. Notifications will not be sent.

Enter your search words... Search

Statistics

- All 11
- Submitted by me 11
- Assigned to me 0

Options

- + Submit ticket
- List of tickets
- Statistics

1-11/11

ID			
demo0011	1	2	
demo0010	2	2	
demo0009			

InfoCapture / Demo Form / Notifications settings

Ticket # Jump Search Switch to Demo Form

+ Submit ticket

Please notify me about any changes in tickets which are...

Submitted by me  Default  Yes  No

Assigned to me  Default  Yes  No

Any new tickets

Save

3- Finally, you will need to ensure that the users are definitely not included in any of the roles that are due to get notifications, a way of checking this is reviewing the template of the notification. If you know the subject line of the email is 'A new Bug issue reported....' you can check who is in line to receive this notification, in the example below:

[+ Add new rule](#)

Trigger	Notification type	Notification template	Send notifications to	
New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	↓ 🗑️
New issue reported	Email	Issue reported: Development	Development	↑ ↓ 🗑️
Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ ↓ 🗑️
Status changed	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ ↓ 🗑️
Note added	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ 🗑️

Notifications templates

[+ Add new template](#)

Name	Subject line	Type	
Issue reported: Reporter	🗨️ Bug {issue:_id_in_project_} has been reported: {issue:summary}	HTML	🗑️
Issue updated: Reporter & Handler	🗨️ Bug {issue:_id_in_project_} has been updated: {issue:summary}	HTML	🗑️
Issue reported: Development	🗨️ A new Bug {issue:_id_in_project_} has been reported : {issue:summary}	HTML	🗑️
Issue assigned: Handler	🗨️ Bug {issue:_id_in_project_} has been assigned to you: {issue:summary}	HTML	🗑️

You would then need to

double check the user that recieved this notification is not in the 'Development' role.

Last modified on 19 August 2020 by Mhairi Hutton

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